



# **FY 2009 Policy Matrix**

Budget and Finance Committee Meeting  
September 10, 2008

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# BACKGROUND

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- Each year the IBA has made policy and financial recommendations as part of its review of the Mayor's Proposed Budget
- For FY 2008, the IBA made thirty-three recommendations, and tracked progress throughout the year



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# BACKGROUND

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- Significant accomplishments last year included:
  - Council review and approval of:
    - Reserves Policy
    - Debt Policy
    - Investment Policy
    - Establishment of Retiree Health Trust with CalPERS
    - Cost-recoverable fee for Refuse Containers
    - Revisions to CDBG Council Policy 700-02



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# SOURCES FOR POLICY MATRIX

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- Inputs compiled from various sources:
  - Issues raised but not resolved in budget process
  - Councilmember requests in budget memos
  - Items requiring budget monitoring
  - Items from last year not yet completed
- Thirty-one recommendations focusing on public safety, restoring financial stability, and increasing efficiency and effectiveness



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# COUNCIL REQUESTS

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- Public safety is a primary concern
  - Fire Station Master Plan
  - Public Safety Bond Financing
  - Fee Structure and Cost Recovery Review
  - City Attorney Case Management
  - Advanced Water Treatment Demonstration Project
  - Family Justice Center/YWCA Proposal



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# BUDGET MONITORING

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- These items affect budget throughout year:
  - Redevelopment Agency Debt Repayment
  - Status of Deferred Maintenance Plan
  - BPR/Managed Competition Status
  - ADA Project Status
  - Disaster Reimbursements
  - Reports on Performance Measures



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# CONTINUED FROM FY 2008

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- These items were identified last year and work continues:
  - Year-round Winter Shelter
  - Booking Fees
  - CDBG Reforms
  - Budget Policy
  - Cost Recovery Policy



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# NEXT STEPS

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- Obtain input from Committee
- Work with departments to move items along
- Report quarterly on progress



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